

### **EMS Tips to Remember**

**To ensure that Policy and Procedure is followed for submitting expenses using the Expense Management System (EMS) complete the following:**

- Verify that the **Business Purpose** sufficiently supports the expenses. (I.e. can answer the following questions; For what business reason was expense incurred? For whom was this expense incurred?)
- Verify that **expense is not a duplicate** and has not already been paid or reimbursed. If a duplicate expense is found, follow the reconciliation process as noted in the [PCard/EMS User Guide](http://www.yale.edu/oboe/aeo/ems/userguide.pdf).  
<http://www.yale.edu/oboe/aeo/ems/userguide.pdf>
- Verify that any **policy exception approvals** are granted and documented.
- Make sure that **all required supporting documentation** is included and legible.

**To ensure that the appropriate method to process the expense is used, verify the following:**

- **Relocation Expenses** should not be paid for using the P-Card, nor should these reimbursements be processed in EMS due to tax requirements. Refer to the Policy and Procedure website, [Form 3501 FR.06a](#) for Relocation Expenses.
- Commonly purchased items under contract should not be paid for using the P-Card. These purchases should be made via SciQuest. Click [here](#) to refer to the University Buying Guide.

#### **References:**

[Procedure 3215 PR.01](#) *Purchasing Cards and Expense Management System*  
[Guide 3215 GD.01](#) *PCARD Travel/Entertainment Approver Checklist*  
[Guide 3215 GD.02](#) *PCARD Coordinator Checklist*